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Automated Customer "Health Score" Engine for Predictive Customer Relationship Management

Revathi Gundarapu, Ashritha Sunkara, Kiranmayi Dasari, Hamsini Puramsetti, Anjali Tangi, Doodala Kondababu

Department of Information Technology, Pragati Engineering College, Surampalem, AP, India

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Customer Health Score, Salesforce, Customer Relationship Management (CRM) Automation, Customer Success, Predictive Analysis, Apex, Lightning Framework

ABSTRACT

Customer retention has emerged as a critical challenge for modern businesses, particularly in an era where vast amounts of customer data are continuously generated. While organizations have advanced capabilities to collect and store this data, they often face difficulties in transforming it into actionable insights. One of the primary issues is the fragmented and dispersed nature of customer data across multiple platforms and systems, which makes it difficult to form a unified view of the customer. Additionally, the absence of real-time analytics further limits the ability of businesses to promptly identify customers who may be at risk of churn. Without timely and accurate insights, organizations are unable to implement proactive strategies, leading to missed opportunities in maintaining strong customer relationships and ensuring long-term loyalty. To overcome this challenge, the Automated Customer Health Score Engine was developed using Salesforce, offering an intelligent and data-driven approach to customer management. This system evaluates a wide range of customer attributes, including engagement levels, product usage patterns, service interactions, and historical behavior. These variables are systematically analyzed and translated into a comprehensive health score that represents the overall condition of each customer. By integrating rule-based logic with machine learning algorithms, the system ensures both consistency and predictive accuracy in its assessments. Furthermore, its implementation within the Salesforce ecosystem enables real-time monitoring and seamless access to insights across teams. As a result, businesses can quickly identify at-risk customers, prioritize targeted interventions, and design personalized retention strategies, ultimately enhancing customer satisfaction, strengthening relationships, and improving overall business performance.

I. INTRODUCTION

Customer retention and satisfaction have become critical factors for sustainable business growth, as retaining existing customers is significantly more cost-effective than acquiring new ones. High customer satisfaction enhances loyalty, increases lifetime value, and transforms customers into brand advocates who contribute to long-term profitability. However, identifying at-risk customers remains a major challenge due to fragmented data, inconsistent behavioral signals, and delayed feedback mechanisms. These limitations often result in reactive strategies rather than proactive retention efforts [1].

The emergence of data analytics and artificial intelligence (AI) has significantly transformed Customer Relationship Management (CRM) systems by enabling organizations to derive actionable insights from large volumes of customer data. AI-driven techniques facilitate predictive analysis, personalized engagement, and automated decision-making, thereby improving customer experience and retention outcomes. One such advancement is the concept of the Customer Health Score, a data-driven metric that evaluates the strength of customer relationships based on engagement, usage, and behavioral indicators [2].

This study proposes an Automated Customer Health Score Engine that analyzes customer data, generates accurate health scores, and identifies at-risk customers at an early stage. The system aims to provide actionable insights and support proactive strategies to enhance customer retention and overall business performance [3], [4].

II. LITERATURE REVIEW

Recent research in customer churn prediction emphasizes the use of machine learning and explainable AI techniques to improve prediction accuracy and interpretability. These approaches address challenges such as data imbalance and feature selection, enabling organizations to proactively identify customers at risk of leaving [1], [2].

Customer Lifetime Value (CLV) models have also evolved with the integration of predictive analytics and AI, allowing businesses to forecast long-term profitability and optimize marketing strategies. These modern approaches overcome limitations of traditional RFM-based methods by enabling dynamic segmentation and personalized decision-making [10].

In SaaS environments, health scoring systems have gained importance as they combine engagement, usage, and behavioral metrics to monitor customer success. These systems enable early risk detection, automated alerts, and proactive lifecycle management [4]. Additionally, AI-based CRM analytics leverages machine learning, natural language processing, and predictive modeling to transform raw data into actionable insights, improving automation and personalization [8].

Traditional customer evaluation methods, which rely on historical and descriptive metrics, lack predictive capabilities and fail to capture dynamic behavior patterns. In contrast, modern machine learning techniques such as Random Forest, XGBoost, and neural networks provide enhance[ed accuracy in analyzing customer behavior and predicting churn. Automated scoring systems further improve efficiency by continuously evaluating customer data and generating real-time insights [13].

III. SYSTEM ARCHITECTURE / PROPOSED FRAMEWORK

The proposed Automated Customer Health Score Engine is designed as a multi-layered architecture that integrates data collection, processing, scoring, and visualization components. The system collects data from multiple sources such as transactional records, customer interactions, support logs, and product usage metrics, creating a unified dataset for analysis.

Feature extraction transforms raw data into meaningful variables such as engagement frequency, purchase behavior, and service interactions. These features are then processed by a scoring algorithm that combines weighted rules and predictive models to generate a dynamic health score reflecting customer risk levels and engagement quality [3].

The automation pipeline ensures seamless data flow from collection to score generation, enabling real-time updates and minimizing manual intervention. Finally, the system presents results through an interactive dashboard that visualizes customer health metrics, trends, and risk categories, supporting informed decision-making .

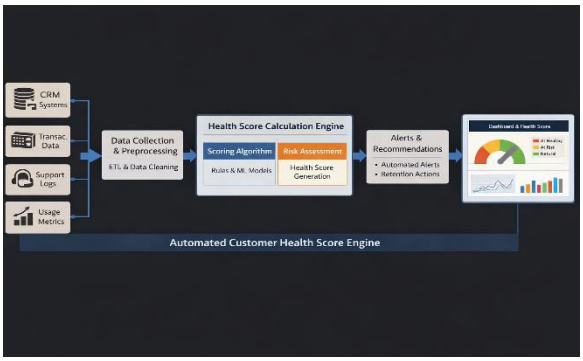

Figure 1: System architecture of the Automated Customer Health Score Engine illustrating data collection, preprocessing, scoring algorithm, risk assessment, and visualization components.

Figure 1 illustrates the overall architecture of the Automated Customer Health Score Engine, which is designed to process customer data and generate actionable insights for proactive decision-making. The system begins with the data collection layer, where customer information is gathered from multiple sources such as transactional records, customer interactions, support logs, and product usage data.

The collected data is then passed through the preprocessing module, where it is cleaned, transformed, and standardized to ensure consistency and accuracy. Following this, the feature engineering stage extracts meaningful attributes such as engagement level, purchase frequency, and support activity, which are essential for evaluating customer behavior [4] .

These features are then fed into the health score calculation engine, which combines rule-based methods and machine learning models to compute a comprehensive customer health score. Based on this score, customers are categorized into different risk levels such as healthy, neutral, and at-risk.

Finally, the results are presented through a dashboard and reporting interface, enabling visualization of customer health metrics and trends. The system also supports alerts and recommendations, allowing businesses to take proactive actions to improve customer retention and satisfaction.

IV. METHODOLOGY

The methodology combines multiple approaches to ensure accurate and reliable health score computation. A weighted scoring model assigns importance to different customer attributes, while machine learning classification models analyze historical data to predict customer risk categories. Rule-based scoring ensures transparency by applying predefined business conditions, and a hybrid AI model integrates both approaches to enhance accuracy and adaptability [5].

The process begins with data cleaning, where inconsistencies and missing values are handled to ensure data quality. Feature selection identifies the most relevant variables influencing customer behavior, followed by model training using historical datasets. The computed health score represents the overall customer condition and is used to categorize customers into healthy, neutral, or at-risk segments[6].

Key factors influencing the score include customer engagement, purchase frequency, support interactions, payment history, and product usage. These parameters collectively provide a comprehensive view of customer behavior and enable effective prediction of churn risk [7].

Stage	Component	Description	Techniques Used	Output
1	Data Cleaning	Removes missing values, duplicates, and inconsistencies to ensure high-quality input data	Data preprocessing, normalization, imputation [6]	Cleaned dataset
2	Feature Selection	Identifies important variables influencing customer behavior	Correlation analysis, feature importance, dimensionality reduction [5]	Selected features
3	Weighted Scoring Model	Assigns weights to customer attributes based on business importance	Rule-based weighting, scoring functions [14]	Initial health score
4	Machine Learning Classification	Predicts customer risk levels using historical data	Decision Trees, Random Forest, XGBoost [5], [7]	Predicted risk category
5	Rule-Based Scoring	Applies predefined business	Threshold rules, condition-bas	Rule-adjusted score

		rules for transparency and control	ed logic [14]	
6	Hybrid AI Model	Combines ML predictions with rule-based logic for better accuracy	Ensemble techniques, hybrid modeling [7]	Final optimized score
7	Score Computation	Aggregates all inputs to generate a single customer health score	Weighted aggregation, normalization [10]	Numerical health score
8	Categorization	Classifies customers into segments based on score thresholds	Classification rules [1]	Healthy / Neutral / At-Risk
9	Customer Engagement Analysis	Evaluates user activity and interaction levels	Behavioral analytics [8]	Engagement score
10	Purchase Frequency Analysis	Measures transaction consistency and frequency	Time-series analysis [9]	Purchase behavior metric
11	Support Ticket Analysis	Assesses customer issues and service interactions	Ticket frequency, resolution time [2]	Support impact score
12	Payment History Analysis	Evaluates payment consistency and delays	Payment tracking, risk scoring [1]	Financial reliability score
13	Product Usage Analysis	Tracks usage patterns and feature adoption	Usage analytics [8]	Usage score

Table 1: Methodology Workflow of Automated Customer Health Score Engine

V. IMPLEMENTATION

The system is implemented using programming languages such as Python or Java, enabling efficient data processing and model development. Visualization and application tools like Power BI, Tableau, and Flask are used to create dashboards and web interfaces for real-time monitoring. Machine learning libraries such as Scikit-learn and TensorFlow are employed to build and evaluate predictive models [3].

Customer data is stored in databases such as MySQL and MongoDB, ensuring efficient data management and scalability. The system is deployed in cloud or server-based environments, enabling continuous operation, real-time processing, and seamless integration with CRM platforms [4].

Sl. No.	Component	Technology Used	Description
1	Programming Language	Python / Java	Used for developing backend logic, data processing, and implementing machine learning models efficiently [5]
2	Data Processing Framework	Pandas / NumPy	Handles data cleaning, transformation, and preprocessing operations for structured datasets [6]
3	Machine Learning Libraries	Scikit-learn, TensorFlow	Used to build, train, and evaluate predictive models for customer health score classification [5]
4	Visualization Tools	Power BI / Tableau	Provides interactive dashboards and visual analytics for monitoring customer health metrics [4]
5	Web/Application Framework	Flask / Django	Enables development of web interfaces for accessing health score insights and reports [3]
6	Database System	MySQL / MongoDB	Stores structured and unstructured customer data with efficient querying and scalability support [3]
7	CRM Platform Integration	Salesforce (Apex,	Integrates customer data and

		Lightning)	enables real-time access within CRM environment [3]
8	Deployment Environment	Cloud (AWS / Azure)	Ensures scalability, availability, and continuous system operation [9]
9	Data Integration	APIs / ETL Tools	Facilitates data extraction from multiple sources and ensures seamless data flow [6]
10	Automation tools	Scheduled Jobs / Triggers	Enables automatic updates of health scores and alerts without manual intervention [4]

Table 2: Technologies and Tools Used in the Implementation of the Automated Customer Health Score Engine

VI. EXPERIMENTAL RESULTS

The performance of the proposed system is evaluated using multiple metrics, including prediction accuracy, customer risk detection rate, and precision-recall analysis. These metrics demonstrate the effectiveness of the model in correctly identifying at-risk customers and minimizing classification errors [1].

Results are presented using tables and graphical visualizations to provide clear insights into model performance. Trend graphs illustrate customer behavior over time, while health score distribution charts highlight the proportion of customers in different risk categories. The findings indicate that the system significantly improves early detection of churn and supports proactive decision-making [10].

Figure 2: Salesforce dashboard displaying customer health score distribution and key performance indicators

Figure 2 presents the dashboard view of the Automated Customer Health Score Engine, offering a comprehensive summary of customer health metrics through an intuitive Salesforce-style interface. The dashboard includes a health score gauge that represents the overall average score of customers, providing a quick indication of the general customer condition.

A customer segmentation chart categorizes customers into Healthy, Neutral, and At-Risk groups based on predefined thresholds, enabling easy identification of customers requiring attention. Key performance indicators such as average health score, number of at-risk customers, and monthly churn rate are also displayed to support data-driven decision-making.

Additionally, the dashboard incorporates a trend analysis graph that illustrates variations in customer health scores over time. This helps organizations monitor changes in customer behavior, detect early signs of risk, and implement proactive retention strategies. Overall, the dashboard serves as a centralized visualization tool for tracking customer health and improving business outcomes.

Figure 3: Salesforce report displaying customer health scores and classification of individual customers based on predefined thresholds

Figure 3 presents the Customer Health Report, which provides a structured tabular view of individual customer health scores along with their corresponding status classifications. Each customer is evaluated using predefined threshold values, where higher scores indicate stronger engagement and lower churn risk, while lower scores reflect potential dissatisfaction and higher risk.

Customers such as John Smith and Michael Brown are categorized as *Healthy*, indicating consistent usage, active engagement, and positive interaction history. Emily Johnson falls under the *Neutral* category, suggesting moderate engagement and the need for

continuous monitoring. In contrast, Sarah Davis and David Wilson are classified as *At Risk*, highlighting reduced activity levels or negative behavioral patterns that may lead to customer churn.

This tabular representation enables organizations to quickly identify high-risk customers and prioritize intervention strategies such as personalized communication, support actions, or targeted offers. Overall, the report supports efficient customer segmentation and enhances proactive decision-making in customer relationship management.

Figure 4: Customer Health Report in Salesforce displaying customer names, health scores, and status classification

Figure 4 presents the detailed Customer Health Report, which provides an in-depth view of an individual customer's profile along with key health indicators. The interface includes essential information such as customer name, contact details, account owner, and customer tenure, offering a comprehensive understanding of the customer relationship.

The health score is prominently displayed and represents the overall condition of the customer based on multiple behavioral and transactional factors. In this case, the customer is categorized as *Healthy* with a high score, indicating strong engagement, consistent usage, and positive interaction history. The report also highlights the risk level as low, suggesting minimal likelihood of churn.

Furthermore, the inclusion of the last updated timestamp ensures that the displayed information reflects recent customer activity. This detailed view enables organizations to monitor individual customers closely, identify changes in behavior, and take timely actions such as personalized engagement or support interventions. Overall, the report enhances customer-level analysis and supports proactive customer relationship management.

Figure 5: Trend analysis of customer engagement and risk levels over time

Figure 5 illustrates the trend analysis of customer engagement and associated risk levels over a defined time period. The graph presents two key metrics: engagement rate and risk level, enabling a comparative understanding of customer behavior patterns.

The engagement rate, represented by a continuous line, shows a gradual decline over time, indicating reduced customer interaction with the product or service. In contrast, the risk level, depicted by a secondary trend, shows an increasing pattern, suggesting a rising probability of customer churn. This inverse relationship highlights that as customer engagement decreases, the likelihood of churn correspondingly increases.

Such trend analysis is crucial for early detection of potential customer dissatisfaction. By continuously monitoring these patterns, organizations can implement proactive strategies such as targeted communication, personalized recommendations, or service improvements to enhance engagement and reduce churn risk. Overall, the visualization supports data-driven decision-making and strengthens customer retention strategies.

VII. APPLICATIONS

The proposed system has wide-ranging applications across industries. In SaaS platforms, it supports customer success management by monitoring engagement and identifying declining usage patterns. In e-commerce, it enables personalized recommendations and targeted retention strategies [1].

In telecom industries, the system analyzes usage patterns and billing behavior to detect churn risks, while in subscription-based services, it tracks user activity and payment consistency to reduce cancellations and improve retention [13].

Sl. No.	Application Area	Description	Benefits
1	SaaS Customer Success Management	Monitors user engagement and product usage to identify declining activity and customer dissatisfaction	Improves retention, enhances customer satisfaction, and reduces subscription churn [1]
2	E-commerce Retention Strategies	Analyzes purchase behavior and engagement patterns to deliver personalized recommendations and targeted promotions	Increases repeat purchases, boosts customer loyalty, and maximizes revenue [8]
3	Telecom Customer Analytics	Evaluates usage trends, billing behavior, and service interactions to detect potential churn risks	Enables proactive customer support, improves service quality, and reduces churn rates [2]
4	Subscription-Based Services	Tracks user activity and payment consistency to identify disengaged or inactive customers	Helps reduce cancellations, improves renewal rates, and strengthens long-term customer relationships [10]

Table 3: Applications of the Automated Customer Health Score Engine across different industries

VIII. LIMITATIONS

Despite its advantages, the system has certain limitations. Data availability issues, such as incomplete or inconsistent datasets, can affect prediction accuracy. Model bias may arise from imbalanced training data, impacting fairness and reliability [5].

Scalability challenges may occur when processing large volumes of data, requiring optimization techniques. Additionally, real-time processing can be limited by data latency and computational constraints [9].

Sl. No.	Limitation	Description	Impact
1	Data Availability	Limited, incomplete, or inconsistent customer data can reduce the quality of analysis and affect the accuracy of generated health scores [9]	Leads to unreliable predictions and weaker decision-making
2	Model Bias	Bias in training data may result in unfair or inaccurate predictions for certain customer segments [5]	Affects fairness, reliability, and generalization of the model
3	Scalability Issues	Handling large volumes of customer data may require advanced infrastructure and optimization techniques [9]	May reduce system performance and increase computational cost
4	Real-Time Processing Challenges	Delays in data processing and integration can limit real-time score updates and responsiveness [6]	Impacts timely decision-making and proactive intervention strategies

Table 4: Limitations of the Automated Customer Health Score Engine

IX. FUTURE WORK

Future enhancements include the integration of deep learning models to capture complex behavioral patterns and improve prediction accuracy. Real-time health scoring capabilities can further enhance responsiveness to customer behavior changes.

Integration with CRM platforms can improve workflow efficiency, while predictive recommendation engines can provide personalized strategies for customer engagement and retention.

X. CONCLUSION

This study addresses the challenge of identifying at-risk customers by proposing an Automated Customer Health Score Engine that leverages data analytics and AI techniques. The system effectively evaluates customer behavior, generates health scores, and supports proactive decision-making.

Experimental results demonstrate improved prediction

accuracy, enhanced customer retention, and better business insights. The proposed solution shows strong potential for future expansion in AI-driven CRM systems, enabling advanced analytics, personalization, and real-time decision-making.

Conflict of interest statement

Authors declare that they do not have any conflict of interest.

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